

## Introduction

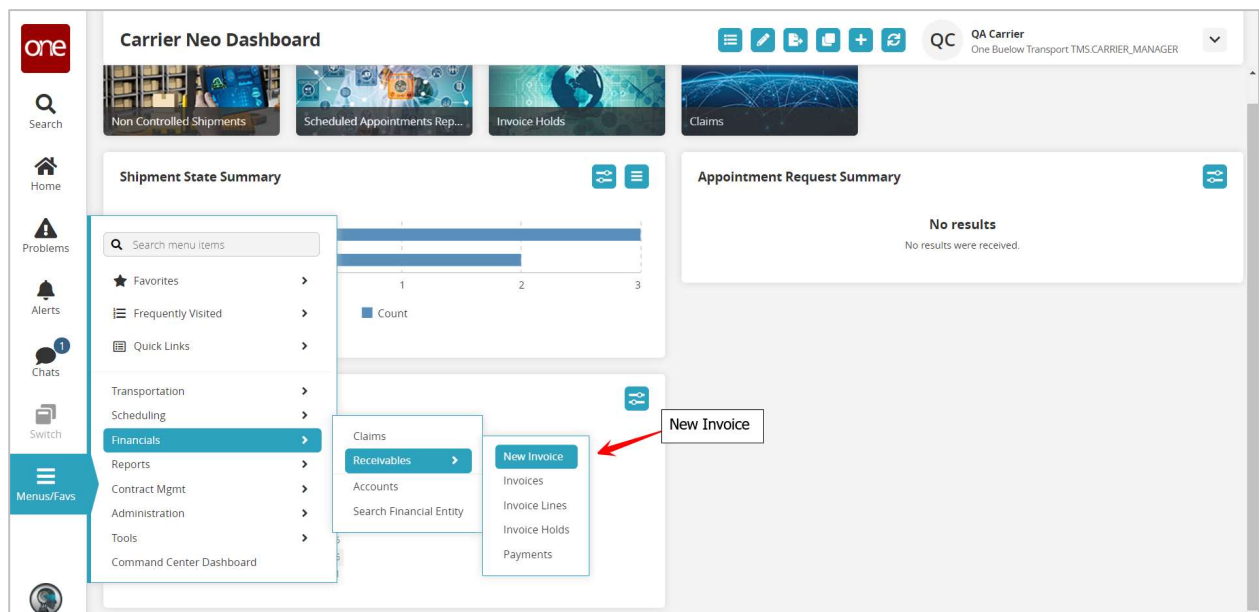
This document provides a quick guide explaining how to manually create an Invoice in the One Network system.

Carriers can create a new Invoice against a Movement plus Carriers can create additional invoices against a Movement to request credit/debit payments.

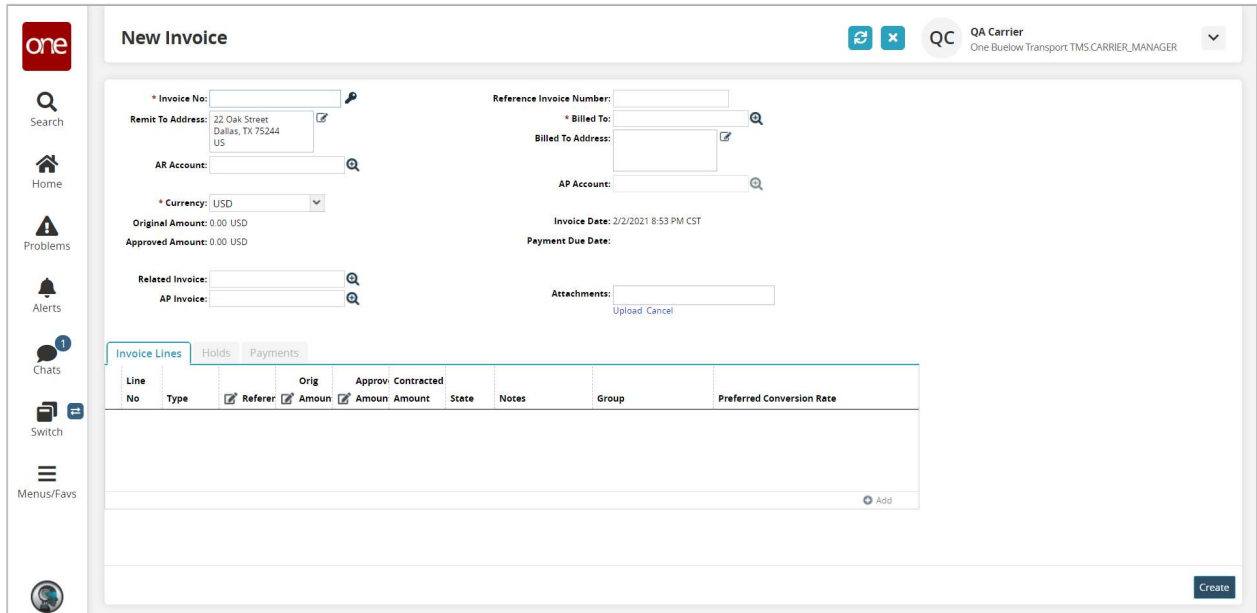
Note – this Quick Guide is for the NEO UI

## Creating an Invoice

1. Log in to the One Network system.
2. Navigate to Menus/Favs -> Financials -> Receivables -> New Invoice to open the **New Invoice** screen.

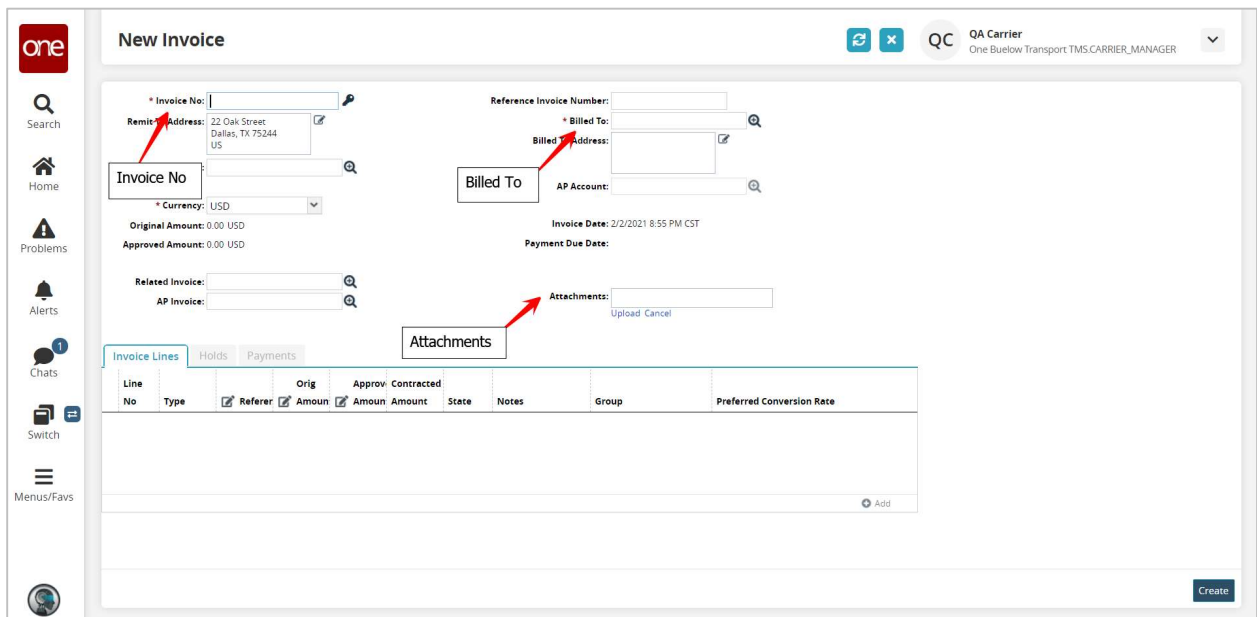


3. The **New Invoice** screen displays.

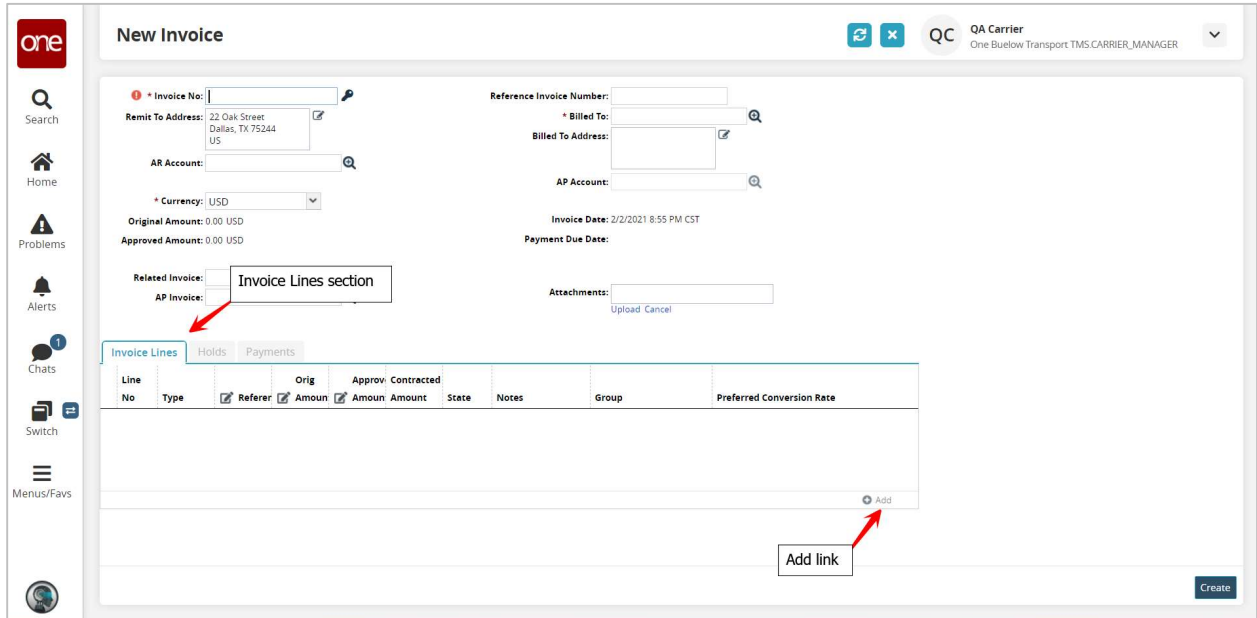


4. Enter information in the following fields:

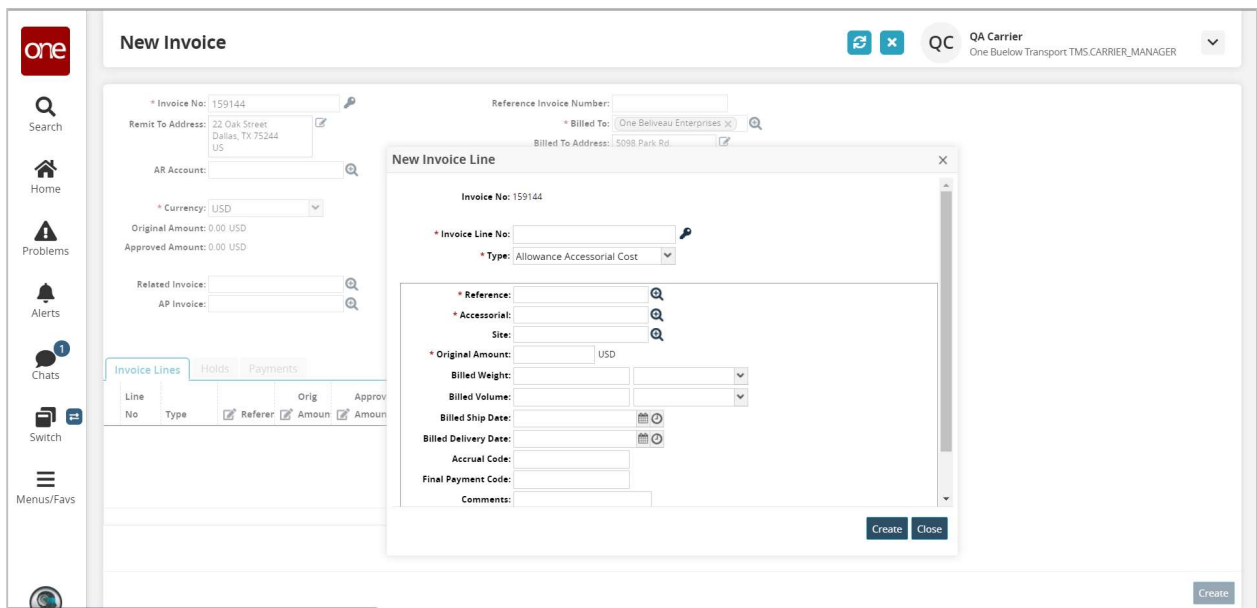
- a. **Invoice No** field – enter your desired Invoice Number  
(Note – you can have the system auto-generate an Invoice Number if desired by selecting the “key” symbol located at the end of that field)
- b. **Billed To** field – enter the name of the company that you are billing  
(Note – this is an auto complete field with a **Search** icon)
- c. **Attachments** field – attach a copy of invoice documentation as needed  
(Note – to attach a document, select the **Upload** link and locate the file on your computer to attach)



5. Next, in the **Invoice Lines** section, click the **Add** link to open the **New Invoice Line** popup window.

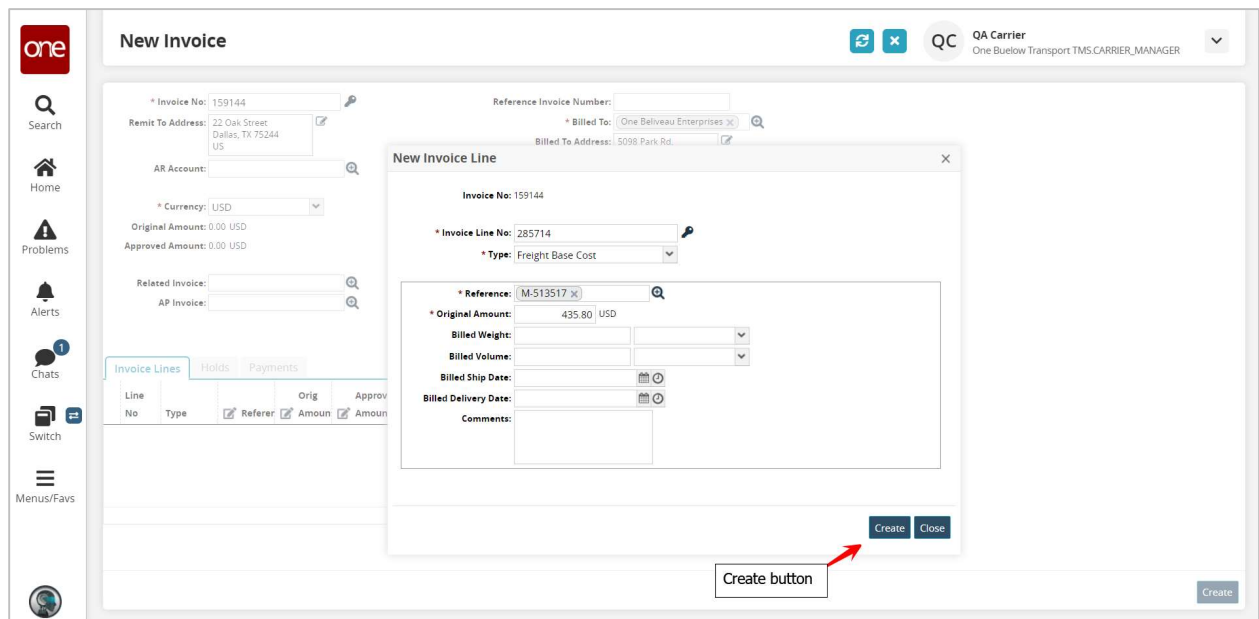


6. The **New Invoice Line** popup window displays.



7. Enter information in the following fields and then click the **Create** button on the popup window.

- a. **Invoice Line No** field – enter your desired Invoice Line Number  
(Note – you can have the system auto-generate the Invoice Line Number if desired by selecting the “key” symbol located at the end of that field)
- b. **Type** field – select the type of cost from the drop-down list for which you are billing  
Note – the main options to use would be: **Freight Base Cost** (used to capture the cost for the line haul/base amount), **Freight Accessorial Cost** (used to capture the cost for a specific accessorial), **Freight Tax** (used to capture the cost for tax).
- c. **Reference** field – enter the Movement Number this Invoice is created against  
(Note – this is an auto complete field with a **Search** icon)
- d. **Original Amount** – enter the amount for the cost (e.g. 125.75). To indicate a debit amount, enter a hyphen/dash before the number (e.g. -100.50).



8. Repeat the above step to add additional invoice lines if needed.

- Once all the invoice line and invoice information has been entered, click the **Create** button on the **New Invoice Screen** to create the invoice.

The screenshot shows the 'New Invoice' interface. At the top, there's a navigation bar with the 'one' logo and user information 'QA Carrier - One Buelow Transport TMS.CARRIER\_MANAGER'. The main area contains several sections:

- Invoice Info:** Invoice No: 159144, Reference Invoice Number: (empty), Remit To Address: 22 Oak Street, Dallas, TX 75244, US, Billed To: One Bellevue Enterprises, 5098 Park Rd., 28002, Asheville, NC 75022, US.
- Financials:** AR Account, AP Account, Currency: USD, Original Amount: 435.80 USD, Approved Amount: 0.00 USD, Invoice Date: 2/2/2021 8:55 PM CST, Payment Due Date.
- Related Invoices:** Related Invoice, AP Invoice.
- Attachments:** Upload, Cancel.
- Invoice Lines Table:**

| Line No | Type    | Referer  | Orig Amoun | Approv Amoun | Contracted | State | Notes          | Group | Preferred Conversion Rate |
|---------|---------|----------|------------|--------------|------------|-------|----------------|-------|---------------------------|
| 2857... | Freight | M-513517 | 435.80     |              |            | New   | View/Add Notes |       |                           |

A red arrow points to the 'Create' button at the bottom right, which is labeled 'Create button'.

- A success message displays indicating the invoice has been created.

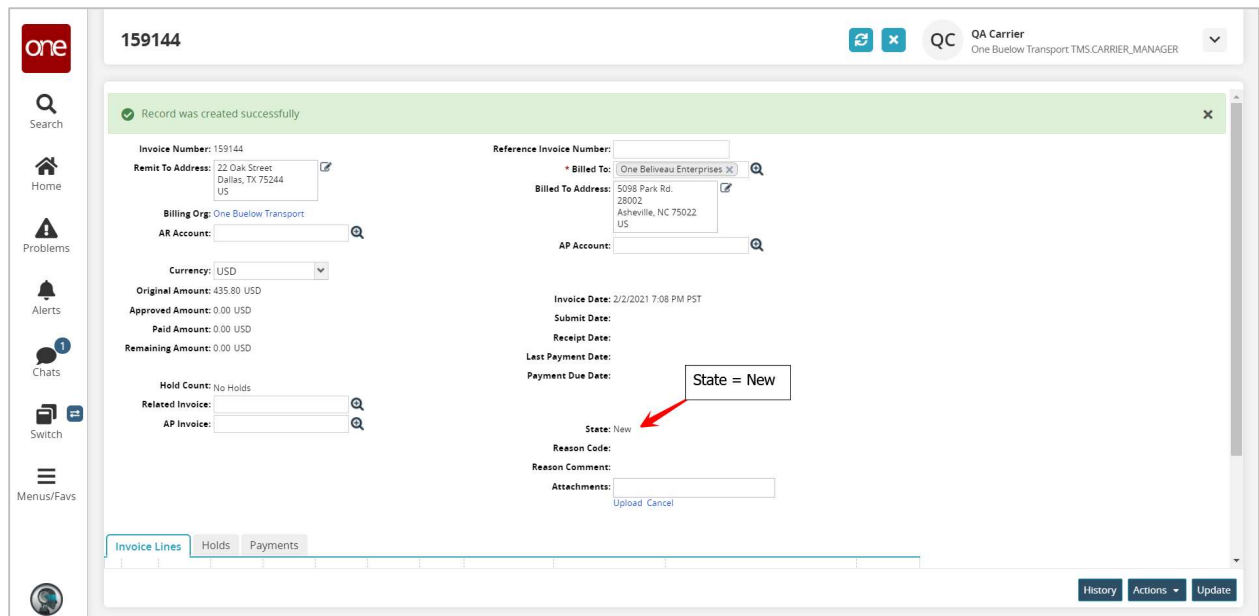
The screenshot shows the '159144' invoice screen. At the top, there's a green success message banner: 'Record was created successfully'. The main area contains the same invoice details as the previous screenshot, but with additional information:

- Submit Date:** 2/2/2021 7:08 PM PST
- Payment Due Date:** (populated)
- Reason Code:** (populated)
- Reason Comment:** (populated)

At the bottom right, there are buttons for 'History', 'Actions', and 'Update'.

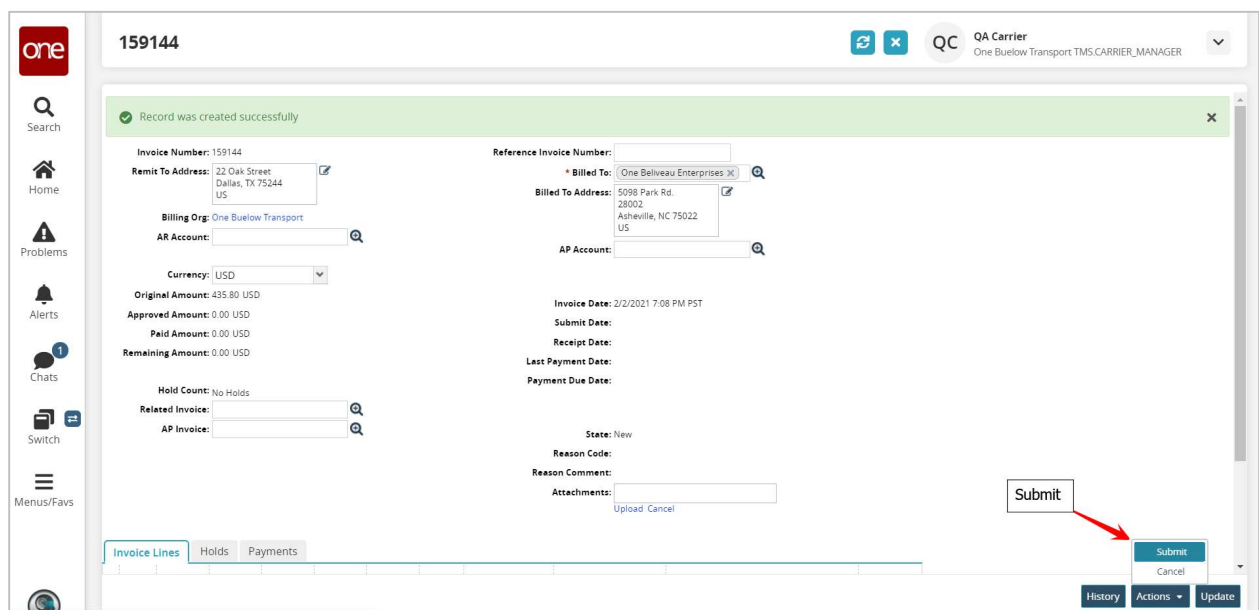
11. When a new invoice is created, it starts in the **New** State.

You will then need to submit the invoice to the company you are billing so they can see your invoice.



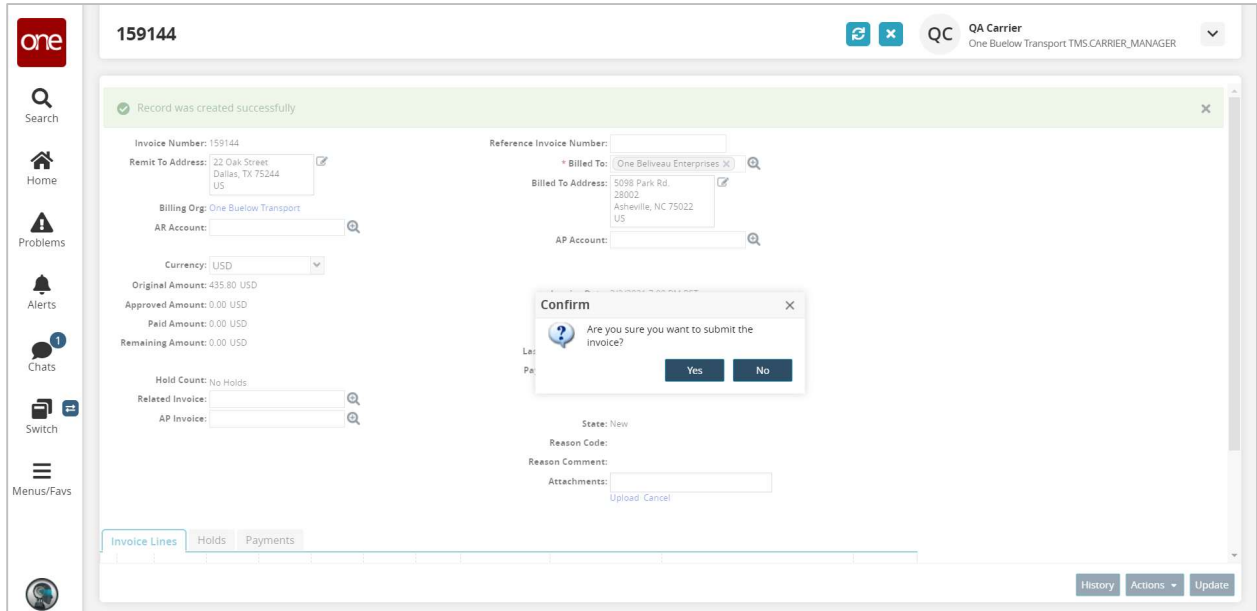
12. To submit the invoice, click the **Actions** button and select the **Submit** option.

Clicking **Submit** sends the invoice to the company you are billing, and that company is then able to review your submitted invoice.

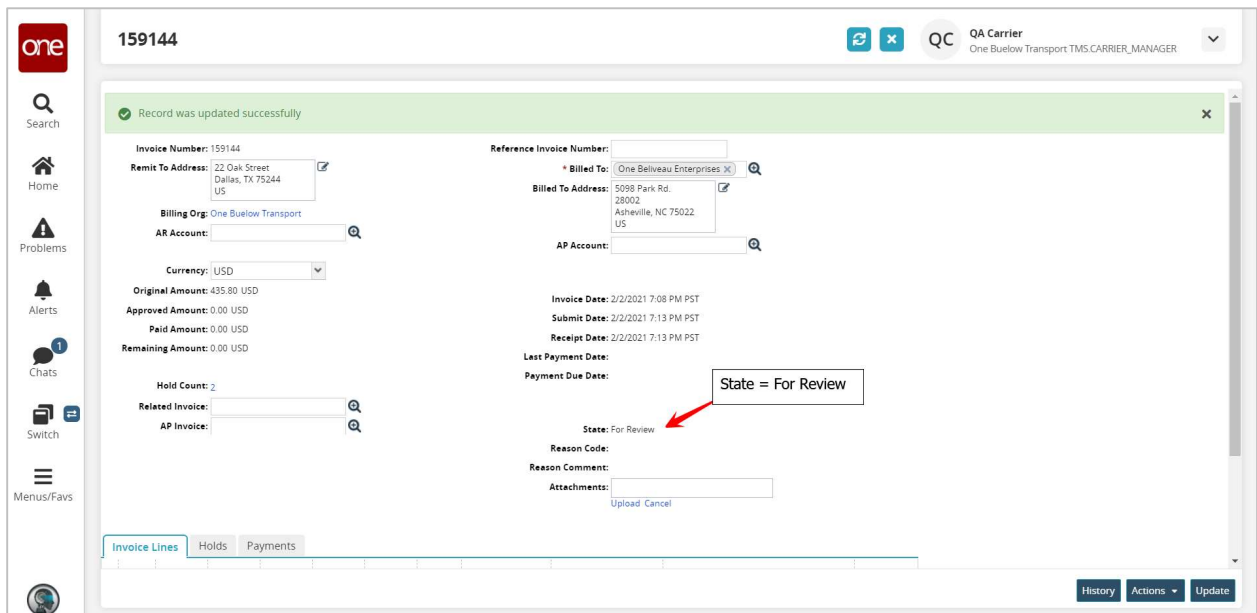


13. Once you select **Submit**, a **Confirm** popup window displays. The window asks you if you are sure you want to submit the invoice.

Click the **Yes** button to confirm.



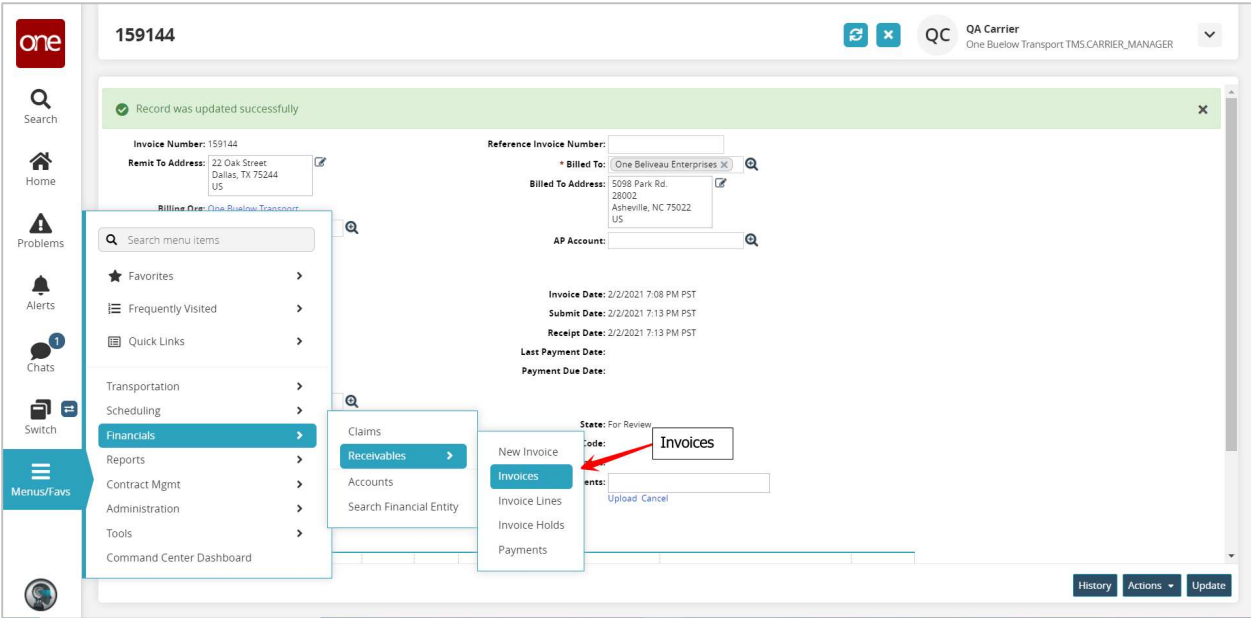
14. A success message displays, and the State of the invoice changes to **For Review**.



15. The company you are billing must review the invoice and either accept it or reject it.

Note – the billing company can set up a policy to auto approve the invoice and its associated **Invoice Amount** based on certain tolerance limits. If the invoice is auto approved once you have submitted it, the State of the invoice changes to **Approved** instead of **For Review**.

16. To view invoices you have submitted and their current State, navigate to Menus/Favs -> Financials -> Receivables -> Invoices to open the **Receivable Invoices** screen.





17. The **Receivable Invoices** screen displays with the list of invoices and their associated State. The State of the invoice is listed under the **Status** column.

The screenshot shows the 'Receivable Invoices' interface. At the top, there is a search bar and a filter dropdown set to 'QA Carrier'. Below the search bar, there are navigation icons for Home, Problems, Alerts, Chats, and Switch. The main content area contains a table with the following data:

| Invoice | Reference Invoice Number | Billed Org               | Status     | Reason Code | Reason Comment | Original Amount | Approved Amount | Paid Ar |
|---------|--------------------------|--------------------------|------------|-------------|----------------|-----------------|-----------------|---------|
| 159144  |                          | One Beliveau Enterprises | For Review |             |                | 435.80 USD      |                 |         |
| 159126  |                          | One Beliveau Enterprises | New        |             |                | 432.50 USD      |                 |         |
| 159124  |                          | One Beliveau Enterprises | New        |             |                | 432.50 USD      |                 |         |
| 159106  |                          | One Beliveau Enterprises | New        |             |                | 100.00 USD      |                 |         |
| 159104  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 159024  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 159008  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 159006  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 159004  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 158964  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 158964  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 158944  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 158904  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |
| 158886  |                          | One Beliveau Enterprises | New        |             |                | 385.00 USD      |                 |         |

At the bottom of the table, it says 'Viewing 1-24 of 24'. Below the table, there are four buttons: 'Export to CSV', 'Generate Report', 'Download CSV For Upload', and 'Upload CSV'.